

Grain SA : S&D Projections / Wintergrain

Opgedateer / Updated
28-Jun-24

GSA's projections for the 2024/25 marketing season are based on the CEC's intentions to plant for wintergrains



Disclaimer: *Everything has been done to ensure the accuracy of this information, however Grain SA takes no responsibility for any losses or damage occurred due to the usage of this information.*

**DIE VRAAG-EN-AANBOD VAN KORING IN DIE RSA
THE SUPPLY AND DEMAND FOR WHEAT IN SOUTH AFRICA**

Opdateer \ Updated	GSA Projection	Scenario 1	Scenario 2	Scenario 3
28-Jun-24	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
Oppervlak aangeplant/Area planted (x1 000 ha)	538	520	520	520
Opbrengs/Yield (ton/ha)	3,9	3,3	3,8	4,0
NOK produksie skatting/CEC crop estimate ('000ton)	2078	1691	1977	2081
Terughoudings en saadproduksie / Retentions and production of seed	45	10	10	10
Minus: vroeë lewerings 2015 / Early deliveries 2015				
Plus: vroeë lewerings 2016 / Early deliveries 2016				
Beskikbaar vir kommersiële lewerings / Available for commercial deliveries	2033	1681	1967	2071
	Grain SA	Grain SA	Grain SA	Grain SA
Kommersiële aanbod / Commercial supply				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	563	559	559	559
Kommersiële produksie / Commercial production	2033	1681	1967	2071
Surplus (Adjustment of the reconciliation)	7	7	7	7
Invoere / Imports	1650	1891	1603	1499
Totale kommersiële aanbod / Total commercial supply	4253	4138	4136	4136
Kommersiële vraag / Commercial demand				
Kommersiële verbruik / Commercial consumption				
Voedsel / Food	3400	3451	3451	3451
Voer / Feed	19	22	22	22
Totaal / Total	3419	3473	3473	3473
Ander verbruik / Other consumption				
Omruilmaal / Gristing	0	0	0	0
Onttrek deur produsente / Withdrawn by producers	4	5	5	5
Vrygestel aan eindverbruikers / Released to end consumers	1	1	1	1
Net receipts	4			
Saad vir plantdoeleindes / Seed for planting purposes	25	20	20	20
SAGIS (Nota 8)	2	2		
Totaal Ander verbruik / Total Other use	36	28	26	26
Totaal RSA verbruik / Total RSA consumption	3454	3501	3499	3499
Uitvoere / Exports				
Produkte / Products	32	30	30	30
Heelkoring / Whole wheat	208	181	181	181
Totaal / Total	240	212	212	212
Totale vraag / Total demand	3694	3713	3711	3711
Eindvoorraad (30 September) / Carry-out (30 September)	559	425	426	426
Benodigde pyplyn / Pipeline requirements	419	425	425	425
Surplus bo pyplyn/ Surplus above pipeline	140	0	0	0
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	47,8%	54,0%	45,8%	42,8%
Eindvoorraad as % van RSA verbruik/ Carry-out as a % of RSA consumption	16,2%	12,1%	12,2%	12,2%
Eindvoorraad as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	15,1%	11,4%	11,5%	11,5%

*projection for new marketing year

For Projections:

Average yield: 10 Year Average

Low Yield: Lowest figure in the past 10 years

High Yield: Highest figure in the last 10 years

Imports: Balancing figure

Exports: 5 Year average

Rest of the figures: 3 Year average

For Projections:

Hectares: CEC intentions

Average yield: 5 Year Average

Low Yield: Lowest 5 yields

High Yield: Highest 5 yields

Imports: Balancing figure

Exports: 5 Year average

Human consumption: 1,5'

Animal feed: 5 Year average

Rest of the figures: 5 Year average

DIE VRAAG-EN-AANBOD VAN GARS IN DIE RSA THE SUPPLY AND DEMAND FOR BARLEY IN SOUTH AFRICA	GSA Projection	Scenario 1	Scenario 2	Scenario 3
	Final CEC Estimate	Low yield	Average yield	High yield
28-Jun-24				
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
<i>Oppervlak aangeplant/Area planted (ha)</i>	107600	102 000	102 000	102 000
<i>Opbrengs/Yield (ton/ha)</i>	3,5	3,3	3,4	3,9
<i>NOK produksie skatting/CEC crop estimate (ton)</i>	376 195	338 640	346 800	394 740
<i>Beskikbaar vir kommersiële lewerings / Available for commercial deliveries</i>	376 195	338 640	346 800	394 740
	Grain SA	Grain SA	Grain SA	Grain SA
Kommersiële aanbod / Commercial supply				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	149 928	213 098	213 098	213 098
Kommersiële produksie / Commercial production	376 195	338 640	346 800	394 740
Invoere / Imports	164 276	33 367	33 367	33 367
Totale kommersiële aanbod / Total commercial supply	690 399	585 105	593 265	641 205
Kommersiële vraag / Commercial demand				
Menslik / Human	316 226	309 901	309 901	309 901
Voer / Feed	107 846	102 840	102 840	102 840
Totaal kommersieel / Total commercial consumption	424 072	412 742	412 742	412 742
Totaal Ander verbruik / Total Other use	12 960	16 320	16 320	16 320
Totaal RSA verbruik / Total RSA consumption	437 032	429 062	429 062	429 062
Uitvoere / Exports				
Heelgars / Whole barley	9 171	9 171	9 171	9 171
Produkte/Products	31 098	31 098	31 098	31 098
Totaal / Total	40 269	105 158	113 318	161 258
Totale vraag / Total demand	477 301	534 219	542 379	590 319
Eindvoorraad (30 September) / Carry-out (30 September)	213 098	50 886	50 886	50 886
Benodigde pyplyn / Pipeline requirements	52 283	50 886	50 886	50 886
Surplus bo pyplyn/ Surplus above pipeline	160 816	0	0	0
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	38%	8%	8%	8%
Eindvoorrade as % van RSA verbruik/ Carry-out as a % of RSA consumption	49%	12%	12%	12%
Eindvoorrade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	45%	10%	9%	9%

For Projections:

Hectares: CEC intentions

Average yield: 5 Year Average

Low Yield: Lowest 5 yields in the past 10 years.

High Yield: Lowest 5 yields in the past 10 years.

Imports: Balancing figure

Exports: Previous season figure

Human consumption: -2% growth

Animal feed: 5 Year average

DIE VRAAG-EN-AANBOD VAN HAWER IN DIE RSA/ THE SUPPLY AND DEMAND FOR OATS IN SOUTH AFRICA				
Opdateer \ Updated	GSA Projection	Scenario 1	Scenario 2	Scenario 3
28-Jun-24	Final CEC Estimate	Low yield	Average yield	High yield
Bemarkingsjaar / Marketing Year	2023/2024*	2024/2025*	2024/2025*	2024/2025*
Area aangeplant / Area planted	27 500	20 500	20 500	20 500
Opbrengs / Yield (ton/ha)	1,464	1,2	1,4	3,4
NOK produksie skatting / CEC crop estimate (ton)	40 250	23 985	28 085	69 085
Beskikbaar vir kommersiële lewerings / Available for commercial deliveries	40 250	23 985	28 085	69 085
	Grain SA	Grain SA	Grain SA	Grain SA
Kommersiële aanbod / Commercial supply *				
Beginvoorraad (1 Oktober) / Opening stocks (1 October)	23 401	42 517	42 517	42 517
Kommersiële produksie / Commercial production	40 250	23 985	28 085	69 085
Invoere / Imports	47 948	58 156	54 056	13 056
Totale kommersiële aanbod / Total commercial supply	111 599	124 659	124 659	124 659
Kommersiële vraag / Commercial demand				
Voedsel / Food	49 622	50 118	50 118	50 118
Voer / Feed	12 531	13 032	13 032	13 032
Totaal kommersieel / Total commercial consumption	62 153	63 150	63 150	63 150
Ander verbruik / Other consumption				
Onttrek deur produsente / Withdrawn by producers	308	485	485	485
Vrygestel aan eindverbruikers/Released to end consumers	333	655	655	655
Saad vir plantdoeleindes / Seed for planting purposes	6 072	5 681	5 681	5 681
SAGIS (Nota 8)	115	108	108	108
Totaal Ander verbruik / Total Other use	6 828	6 929	6 929	6 929
Totaal RSA verbruik / Total RSA consumption	68 981	70 079	70 079	70 079
Uitvoere / Exports	101	126	126	126
Totale vraag / Total demand	69 082	70 205	70 205	70 205
Eindvoorraad (30 September) / Carry-out (30 September)	42 517	54 454	54 454	54 454
Benodigde pyplyn / Pipeline requirements	7 663	7 786	7 786	7 786
Surplus bo pyplyn/ Surplus above pipeline	34 855	46 668	46 668	46 668
% invoere t.o.v RSA verbruik/ % imported of RSA consumption	70%	83%	77%	19%
Eindvoorrade as % van RSA verbruik/ Carry-out as a % of RSA consumption	62%	78%	78%	78%
Eindvoorrade as % van totale kommersiële vraag/ Carry-out as a % of total commercial demand	62%	78%	78%	78%

For Projections:

Hectares: CEC intentions

Average yield: 5 Year Average

Low Yield: Lowest 5 yields in the past 10 y

High Yield: Lowest 5 yields in the past 10 y

Imports: Balancing figure

Exports: Previous season figure

Human consumption: 0,1% growth

Animal feed: 4% increase